

ORDER FOR SUPPLIES OR SERVICES

PAGE OF PAGES

1

2

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 11/13/2019		2. CONTRACT NO. (If any) 68HE0H18A0001		6. SHIP TO:	
3. ORDER NO. 68HERH20F0045		4. REQUISITION/REFERENCE NO. PR-OAR-19-01283		a. NAME OF CONSIGNEE OAR/OAP	
5. ISSUING OFFICE (Address correspondence to) HPOD US Environmental Protection Agency William Jefferson Clinton Building 1200 Pennsylvania Avenue, N. W. Mail Code: 3803R Washington DC 20460				b. STREET ADDRESS US Environmental Protection Agency 1200 Pennsylvania Avenue NW Mail Code: 62101J OAR/OAP	
				c. CITY Washington	e. ZIP CODE 20460
7. TO: JING HOFFMANN				f. SHIP VIA	
a. NAME OF CONTRACTOR Cadmus Group LLC, The				8. TYPE OF ORDER	
b. COMPANY NAME				<input type="checkbox"/> a. PURCHASE <input checked="" type="checkbox"/> b. DELIVERY REFERENCE YOUR: _____ Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
c. STREET ADDRESS 100 5TH AVENUE SUITE 100				Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
d. CITY WALTHAM		e. STATE MA	f. ZIP CODE 024518727		
9. ACCOUNTING AND APPROPRIATION DATA See Schedule				10. REQUISITIONING OFFICE HPOD	
11. BUSINESS CLASSIFICATION (Check appropriate box(es))					
<input type="checkbox"/> a. SMALL <input checked="" type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input type="checkbox"/> d. WOMEN-OWNED <input type="checkbox"/> e. HUBZone <input type="checkbox"/> f. SERVICE-DISABLED VETERAN-OWNED <input type="checkbox"/> g. WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOSB PROGRAM <input type="checkbox"/> h. EDWOSB					
13. PLACE OF				12. F.O.B. POINT Destination	
a. INSPECTION Destination		b. ACCEPTANCE Destination		14. GOVERNMENT B/L NO.	
				15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date) 09/30/2019	
				16. DISCOUNT TERMS	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	GSA Contract #: GS-00F-227CA DUNS Number: 101163731 This BPA call order hereby incorporates the terms and conditions from EPA BPA number 68HE0H18A0001. Continued ...					
18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOTAL (Cont. pages)
21. MAIL INVOICE TO:						
a. NAME RTP Finance Center		\$58,526.00				17(i) GRAND TOTAL
b. STREET ADDRESS (or P.O. Box) US Environmental Protection Agency RTP-Finance Center (AA216-01) 109 TW Alexander Drive www2.epa.gov/financial/contracts		\$58,526.00				
c. CITY Durham		d. STATE NC	e. ZIP CODE 27711			

22. UNITED STATES OF AMERICA BY (Signature) 11/13/2019

23. NAME (Typed)
Benjamin Delaney
TITLE: CONTRACTING/ORDERING OFFICER

ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION

PAGE NO
2

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DATE OF ORDER 11/13/2019	CONTRACT NO. 68HE0H18A0001	ORDER NO. 68HERH20F0045
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ITEM NO. (a)	SUPPLIES/SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	<p>This is a time-and-materials call order with a total not to exceed amount of \$58,526.00. The contractor shall perform in accordance with the Statement of Work.</p> <p>COR: Jerry Lawson</p> <p>Support for Small Business and Congregational ENERGY STAR Partners \$58,526.00</p> <p>Admin Office: HPOD US Environmental Protection Agency William Jefferson Clinton Building 1200 Pennsylvania Avenue, N. W. Mail Code: 3803R Washington DC 20460</p> <p>Accounting Info: 19-20-B-58E3-000A46XP3-2505-1958EE9155-001 BFY: 19 EFY: 20 Fund: B Budget Org: 58E3 Program (PRC): 000A46XP3 Budget (BOC): 2505 DCN - Line ID: 1958EE9155-001 Period of Performance: 11/15/2019 to 11/14/2020</p>					
0001	<p>New call order for competition on existing multiple award contract</p> <p>New Task Order on Existing EPA Contract</p> <p>COR: Jerry Lawson</p> <p>#68HE0H18A0001, 68HE0H18A0003, 68HE0H18A0004; TO:#N/A</p> <p>Support for Small Business and Congregational ENERGY STAR Partners \$58,526.00</p>				58,526.00	

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17(H))

\$58,526.00

Contract Number: 68HE0H18A0001 (Cadmus), 68HE0H18A0003 (ICF), 68HE0H18A0004 (RE Tech Advisors)

STATEMENT OF WORK

Analytical, Technical and Outreach Support for ENERGY STAR® for Small Business and Congregations Buildings and Facilities

Period of Performance November 15, 2019 – November 14, 2020

BACKGROUND:

Energy efficiency is one of the lowest cost strategies for reducing the environmental impact of buildings and plants. Since 1992, the ENERGY STAR program has served as a trusted source of information to help consumers and organizations throughout the nation adopt energy-efficient products and practices. Through ENERGY STAR, EPA promotes energy efficiency across the residential, commercial and industrial sectors to reduce costs and emissions.

Increasing energy efficiency in the commercial and industrial sectors offers sizable opportunities for cost savings while avoiding emissions of greenhouse gases. Many analyses suggest that substantial savings from cost-effective improvements are available across these sectors if certain market barriers, including lack of corporate commitment, lack of information, lack of measurement tools, and tenant/landlord split incentives are eliminated or minimized.

EPA offers ENERGY STAR to businesses, congregations and other organizations as a straightforward way to adopt strategic energy management and realize the cost savings and environmental benefits that can result. EPA promotes a strategy for strategically managing energy that starts with the top leadership, engages the appropriate employees throughout the organization, uses standardized measurement tools and helps an organization prioritize and get the most from its efficiency investments.

In addition to the businesses and congregations seeking to improve their energy performance, EPA works in partnership with many organizations to ensure that clear, accurate information reaches energy end-users about opportunities for improving energy performance, providing opportunities for these organizations to expand their business. These organizations include energy service providers, utilities, state and local governments, religious denominations, trade associations and public benefits funds administrators.

Program activity levels at the end of 2017 indicate EPA's approach to energy management is being widely adopted in the marketplace. Thousands of organizations have joined as ENERGY STAR partners, dozens of industries and sub-industries participate in industrial focuses to pool ideas and work toward energy efficiency improvements, hundreds of thousands of commercial buildings' floor space is benchmarked in Portfolio Manager, and more than 30,000 buildings and plants have earned ENERGY STAR certification.

PURPOSE:

The purpose of this Call Order is to support EPA initiatives in the small business and faith community sectors. Small businesses and congregations often have special needs related to staffing and resource limitations, the latter often relying on volunteers when saving energy in

their buildings and facilities. The ENERGY STAR Commercial & Industrial Branch at EPA seeks to encourage small businesses, franchising corporations, religious denominations, their institutions and individual congregations to cost-effectively improve energy efficiency across their building portfolios. EPA provides tools and resources to help entities within these markets to develop comprehensive energy management strategies that will enable them to make strategic investments resulting in improved energy efficiency of their buildings and facilities, taking a portfolio-wide approach to strategically managing energy. The nature of interactions with partner organizations is to transform partners' valuations of strategic energy management. In addition, EPA facilitates this by partnering with vendors of energy efficiency products and services, as well as other groups that promote energy efficiency in the commercial, industrial and institutional markets.

Organizations partner with EPA in a variety of ways. Small businesses and congregations who own or manage buildings or facilities can join ENERGY STAR by having a senior executive submit a Partnership Letter to the EPA, committing the organization to strive for continuous improvement in energy performance. This represents a commitment to:

- Measure, track, and benchmark the organization's energy performance by using tools such as those offered by ENERGY STAR;
- Develop and implement a plan to improve energy performance in facilities and operations by adopting the successful energy management strategy promoted by ENERGY STAR;
- Help spread the word about the importance of energy efficiency; and,
- Highlight achievements with ENERGY STAR.

Religious denominations, Chambers of Commerce, industry-specific business associations and other non-profit member organizations can also become "association partners" with EPA to bring energy efficiency and ENERGY STAR to their respective communities. New policies, including campaigns, competitions and local ordinances are driving a new model of delivering energy efficiency by leveraging existing government resources through ENERGY STAR.

For its part, EPA provides program participants with technical support, tools and services to assist them in reducing energy consumption, with standardized measurement systems, competitions, recognition and communication materials for organizations that achieve energy improvement goals.

REQUIREMENTS:

The Contractor shall provide technical assistance to EPA in conceptualizing, developing, and disseminating its various offerings to the small business and faith community sectors. The Contractor shall provide recommendations to EPA for strategic deployment of ENERGY STAR, and more specific avenues, tools and resources to overcome barriers and foster organization-wide adoption of good energy management practices across these markets. The Contractor shall provide a complement of technical, deployment and outreach and partner support services appropriate to the small business and faith community sectors, relying primarily on resources generally available through program resources developed and maintained through the ENERGY STAR Commercial and Industrial support contract(s). For each task in this call order, the contractor may be required to coordinate with the incumbent contractor to transition tasks.

The contractor shall submit all analysis, options, recommendations, reports, and training materials required under this contract in draft for review by the EPA contracting officer's representative (COR). The Government will make all final regulatory, policy, and interpretive decisions resulting from contractor-provided technical support under this contract and make the final decision on all contractor-provided recommendations. The contractor shall not publish or otherwise release, distribute, or disclose any work product generated under this contract without obtaining EPA's express advance written approval.

The ENERGY STAR program works with national, state and local organizations, including businesses and religious denominations of all types. Messages often must be tailored for the appropriate audience being targeted. Contractor must be knowledgeable about specific sectors and experienced in working with them and have or be able to develop strategic relationships with key organizations. Audiences targeted by EPA include, but are not limited to:

Small business, which represents diverse business sectors - Includes auto dealers, retail, small office buildings in many sectors, food sales/food service, education, multifamily housing, healthcare, lodging, entertainment, and home-based businesses, etc. Most franchisees are considered small businesses, and corporate franchisors are often involved in support efforts. Small manufacturers are referred to ENERGY STAR's industrial support program. The Contractor shall provide reasonable expertise to EPA in each of these business areas, including the operations and facilities management and financial decision-making processes, including sector strategies and messages to speak to the issues of decision makers in these sectors when, when necessary.

Faith/religious community, which represents various facility types. - Includes worship facilities with commercial kitchens and multi-media facilities, K-12 and higher education, hospitals, senior care, multifamily and camps, denominational headquarters, and other religious-related facilities. Referrals to other ENERGY STAR market sector support and ongoing coordination may be necessary with certain religious facilities such as schools, hospitals, senior care, multifamily, etc. The Contractor shall provide reasonable expertise to EPA in each of these areas, including the operations and facilities management and financial decision-making processes, including sector strategies and messages to speak to the issues of decision makers in these sectors when, when necessary.

Vendors of services and products related to building and facility energy efficiency – Includes companies that work with the small business and religious organizations described above to provide energy procurement and management services, financial, architectural and engineering services, and implement energy upgrade projects, or manufacture products that can improve the energy performance of buildings and facilities. These vendors aid target markets to improve the energy efficiency of their operations. The Contractor shall provide to EPA reasonable expertise in these business areas, including approaches to training service and product providers in delivering the ENERGY STAR message, tools and resources and, where applicable, deliver ENERGY STAR benchmarking and labeling services to their clients.

Franchisors, Chambers of Commerce, industry and trade associations – Includes franchising corporations, Chambers of Commerce, trade associations and other groups able to educate their

small business members and, in turn, their customers about energy management decisions. These organizations play a key role in validating and disseminating the ENERGY STAR message to a wide audience in an effective and efficient way. Local Chambers of Commerce are typically a hub of small business membership and activity, so Chambers should be a priority for outreach and engagement during the period of performance. The contractor should strategically consider Chambers that are already program partners, and Chambers in cities with existing local government benchmarking requirements, competitions or campaigns. The Contractor shall identify key, influential trade associations (for example, U.S. Chamber of Commerce, Chambers for Innovation and Clean Energy, Small Business Development Centers, National Automobile Dealers Association, and National Restaurant Association) and franchising companies related to the targeted market sectors and develop strategies to have these groups adopt and promote ENERGY STAR. The Contractor shall support EPA in working with associations and franchising companies and their franchisees, attend conferences, develop presentations and trainings, and create materials targeted to these program participants.

Local Governments – Local governments play a key role in developing energy efficiency programs, policies, and educational campaigns to reach communities about the importance of energy efficiency, environmental protection and ENERGY STAR. New policies, such as energy benchmarking and disclosure, utility policies, energy competitions and other approaches are being implemented through local government efforts, and many are leveraging ENERGY STAR tools and resources as critical components of their programs which address worship facilities and small business facilities. The Contractor shall support EPA in coordinating with local government officials, support the implementation of new policies leveraging ENERGY STAR as appropriate, and provide technical, training and communications materials targeting the local government role in helping to transform the small business and faith community/religious facility market.

Tenants and Tenant Organizations – While most worship facilities and other buildings occupied by religious organizations are owned, rather than leased, many small businesses occupy leased space and have different needs and incentives than property owners. In multi-tenant buildings, including buildings in the office, retail, warehouse, and multifamily sectors (and possibly others), energy use by tenants can contribute most of the whole building's energy use. Owners and managers, as well as tenants themselves in many cases, are looking for ways to achieve greater energy efficiency in leased spaces. Under the Energy Efficiency Improvement Act of 2015, EPA is tasked with developing new recognition within the ENERGY STAR program to recognize tenants and owners who design, construct, and operate high performing tenant spaces. The Contractor shall help small business sector program participants who are tenants learn about and utilize ENERGY STAR tools and resources that support greater efficiency in tenant spaces, such as landlord/tenant engagement around efficiency, improvement guides for tenants, sharing of data between tenants and landlords, case studies, among others.

GUIDANCE FOR WORK PLAN AND TECHNICAL SUPPORT DELIVERABLES

TASK 1. Administration

A. Work Plan Outline and Initial Planning Meeting

The Contractor shall provide the Contracting Officer's Representative (COR) a written Work Plan Outline that contains, at a minimum, a working set of goals, objectives, and general schedule for achieving all tasks, including major deliverables. The Work Plan Outline shall be due to the COR within 30 days of the initial planning meeting with the COR after the contract award. The Contractor shall schedule Initial Planning Meeting with the COR within five (5) days after contract award. Unless otherwise approved by the COR, the Initial Work Plan and all deliverables shall be provided in Microsoft Word format. The Initial Work Plan Outline shall serve as a basis for regular EPA-Contractor Planning meetings in which ongoing implementation, evaluation and any revision of the Work Plan shall be addressed.

The Work Plan Outline shall address the subsequently listed set of tasks in this SOW of (1) Administrative, (2) Market Research, Analysis and Targeting, (3) Technical Support, Strategy Development and Communications, (4) Technical Support for General and Priority Sector Participants, (5) Portfolio Manager Benchmarking and Building Certification (where applicable), (6) Resource/Tool Development and Training, and (7) Tracking, Evaluating and Reporting Key Program Metrics.

Deliverable	Due Date
Initial Planning Meeting	Within five (5) days after contract award
Initial Work Plan Outline	Within thirty (30) days after initial planning meeting

B. EPA-Contractor Planning and Work Meetings

The Contractor shall meet with the COR on a regular basis, in person or via conference call, to review progress and plan activities towards achieving goals and deliverables. For planning purposes, the Contractor can expect the meeting to take place at least once a month, typically scheduled the first week of the month. Additional meetings may be requested by the COR throughout the month. For planning purposes, the Contractor can assume one (1) additional meeting per month.

The Contractor shall prepare an agenda for these meetings. The Contractor shall contact the COR prior to preparing the final agenda, so the COR will have the opportunity to contribute to and approve the agenda. The COR will determine the timing and location.

The Contractor shall provide to the COR written minutes of the monthly meeting, via e-mail, summarizing any key items/issues, decisions made, action items related to Work Plan implementation, evaluation and any revisions of the Work Plan.

Deliverable	Due Date
Meeting Minutes	Within five (5) work days after meeting

TASK 2. Market Research, Analysis and Targeting

It is necessary to understand energy use, business models and decision-making in various sectors and organizations, to determine where best to invest program resources. Research needs may include specific sector operations, business issues including decision-making practices, energy use statistics and potential for energy savings and greenhouse gas reductions, as well as identifying key associations and organizations (and other stakeholder groups) that will be useful in developing and implementing strategies for increasing successful participation in ENERGY STAR among these sectors. Research may also include broader “green building” opportunities and obstacles, and other environmental/climate related efforts to identify opportunities for collaboration, such as water efficiency and indoor air quality.

By learning about how specific markets use energy and what the leverage points are to influence that energy use, it will be possible to develop useful tools and resources as well as create effective marketing plans. The Contractor shall perform any necessary research and analysis regarding small business and religious sectors to learn how energy is used and perceived in a typical organization in that sector and how capital investment decisions are made. EPA recognizes that strategic investments in energy-efficiency can increase the actual and perceived “value proposition” within the organization, whether public or private. With this information, it is possible to develop convincing arguments that will show how reductions in energy use can affect the financial health of the organization, enhance its own mission success and demonstrate environmental leadership.

Deliverable

Market Research and Analysis

Due Date

Per COR Accepted Work Plan or COR
Technical Direction

TASK 3. Technical Support for EPA, Strategy Development/Implementation and Communications

For organizations to make the necessary investments in energy-efficiency to reduce facility energy consumption, program participants must understand the value of energy performance and how to achieve it, within their organizational context. They need information on how to measure their current performance, find economically viable upgrades, secure organizational consensus to invest, and how to receive recognition for their efforts and successes.

1. The Contractor shall use analysis (see previous task) to create sector-specific technical support strategies and tools to increase active participation in ENERGY STAR across targeted market sectors, thereby reducing energy use, and to:

- Raise awareness of the benefits of energy efficiency and the tools and resources available to achieve reductions,
- Motivate organizations to track and manage energy use, including measuring energy

- performance, and to improve organization-wide energy efficiency, and,
- Provide technical support to EPA efforts to recognize program participants that have attained energy performance goals. This includes existing methods of recognition and could include identifying new ways to provide recognition to organizations that are demonstrating notable accomplishments through ENERGY STAR.

2. The Contractor shall coordinate with other technical support, marketing and outreach efforts across the C&I Branch, with franchising corporations, and notably the public sector work with state and local governments. Not only will this foster consistency, but it will also reduce redundancy of efforts and facilitate sharing of successful efforts that may be replicated in other markets. In addition, it may be beneficial to leverage activities and resources in other Branches such as Homes (e.g., congregation's members' homes) and Products (e.g., suites for commercial food service equipment and office equipment). The Contractor shall identify opportunities for cross-Branch and division-wide coordination and leveraging and recommend ways to simplify or streamline activities.

This strategy may include, but is not limited to identifying and delivering:

- Written technical support materials to facilitate program participant upgrades and benchmarking, and for public recognition support.
- Fact sheets, "success stories," participant e-updates, sector guides, articles and Web content
- Coordination with C&I BRANCH, CPPD and EPA media policies and strategies
- Conference planning and attendance
- Facilitation of materials and technical information distribution

Deliverable

Due Date

Technical Support Strategy Development and Communications

Per COR Accepted Work Plan or COR Technical Direction

TASK 4. Technical Support for General and Priority Sector Participants

To assist organizations that join ENERGY STAR in reaching their potential energy performance, they need to be guided toward the appropriate tools and resources. EPA has developed many of these, which are available via the ENERGY STAR Web site, through Webinar training and other media. To maximize government resources, key companies, organizations and trade groups will be targeted to achieve the greatest market transformation (in terms of CO2 reductions and share of marketplace) with the fewest dollars expended.

Webinars are used largely to provide training in support of participant benchmarking and upgrades. Contractor shall determine and make recommendations for continual improvement of Webinars and other training methods for program participants.

The Contractor shall:

- Make available on the Web site and through other efficient means, technical support and guidance to program participants to assist them in improving energy performance of their buildings.
- This may include in-person, on-line and written information dissemination and guidance, with special attention to optimal use of conference calls and Webinars.
- Encourage service and product providers and energy efficiency program sponsors to use ENERGY STAR as a platform for their services provided to small business and congregational sectors.
- Leverage the influence of associations and trade groups among their membership by providing information on how to achieve energy performance improvement or promoting it within their industry/sector.
- Coordinate and cooperate on a broad level internal and external to EPA to promote ENERGY STAR to new audiences.

Deliverable

Due Date

Participant Support / Market Sector Support Per COR Accepted Work Plan or COR Technical Direction

TASK 5. ENERGY STAR Tools, Training and Technical Support Utilization

ENERGY STAR provides its partners with a number of well-designed and maintained existing tools backed by significant training and technical support. The Contractor shall coordinate with the COR, other contractors and partner organizations to promote optimal use of all such tools, training, technical support, as well as campaign and competition resources by and with partnering organizations. Events such as friendly competitions and campaigns are good focal points for the application and utilization of various ENERGY STAR resources such as Portfolio Manager, Action Workbooks, Treasure Hunt, Bring Your Green to Work, the Competition Guide. ENERGY STAR labeled products and WaterSense products and information should also be creatively integrated with other resources in support of partner activities.

- The *Action Workbook for Small Business* and *Action Workbook for Congregations* are “how to” guides available in English and Spanish. All versions may be “co-branded” with cover images, and certain other content unique to the co-branding organizations, which may include religious denominations and associations, local governments, utilities, Chambers of Commerce, franchising corporations and other nongovernmental and nonprofit organizations. Co-branding provides the organization a level of “ownership” of a substantial, but no-cost resource for their constituents, and provides EPA with enhanced distribution of this resource by sources most credible to end users.
- *Portfolio Manager* is EPA’s premier online tool for benchmarking and tracking energy and water use, materials management/recycling and greenhouse gases related to partner facilities. EPA provides a very robust online Training Center with resources such as live and recorded webinars, slides and fact sheets for download, demonstration videos, FAQs and linked Help Desk in support of benchmarking and other efficiency actions.
 - Contractor shall promote and support benchmarking and certification by sector

partners. In addition to public webinars, dedicated or private webinars may be presented for key partner organizations through the Training Center, as well as Skype for Business, which also supports conference call meetings.

- The *Treasure Hunt* campaign features resources such as how-to guides, detail worksheets and “treasure maps” for several facility types to encourage and support organizations’ efforts to engage their employees and members in energy and water efficiency activities.
- Contractor shall develop strategies to encourage organizations to use EPA’s Portfolio Manager tool to track and measure facility performance on a continuing and portfolio-wide basis; and develop strategic partnerships with sector leaders (e.g. business and denominational/interfaith associations), service providers, state/local governments, and utility representatives to promote and utilize Portfolio Manager and other appropriate ENERGY STAR resources.

Deliverable

Due Date

25 co-branded Action Workbooks, 5 Treasure Hunts/competitions, 5 new strategic partnerships and 10 webinars for association partners and other organizations during the period of performance.

Per COR Accepted Work Plan or COR Technical Direction

TASK 6. Resource/Tool Development and Training

To ensure ENERGY STAR remains a leading national one-stop resource for energy performance improvement, it may be necessary to revise or expand the information EPA has available, or to develop tools that are technologically advanced and user-friendly. Occasionally, it will be necessary to provide training and other opportunities for participants, associations and others to meet to learn about the offerings available and to communicate and coordinate with other organizations that are working toward superior energy performance. In these areas, the Contractor shall:

- Identify the need for additional resources to assist participants in achieving continual improvement in energy performance.
 - Complete for publication a “*Successes in Sustainability*” document for small business and for congregations generally modeled on the online *Successes in Sustainability: Landlords and Tenants Team Up to Improve Energy Efficiency* document.
 - Assist in development of a *Designed to Earn the ENERGY STAR* (DEES) webinar for worship facilities.
 - Develop a proposal for an “*Active Partner*” online fact sheet that outlines in promotional fashion the several actions and activities that an highly engaged, active partner would undertake.
- Refine or update existing tools and resources as new information and opportunities become available.
 - With EPA COR and other staff with representatives of NADA (National Automobile Dealers Association) support the development, implementation and

evaluation of a survey designed to collect data from vehicle manufacturers adequate for program contractors to develop a Portfolio Manager module for this industry.

- Maintain awareness and promote use of available C&I Branch energy management tools as appropriate (e.g. Portfolio Manager, Target Finder/Designed to Earn the ENERGY STAR, Guidelines for Energy Management, Licensed Professional Directory/pro bono support, Financial Value Calculator, SPP and EEPs directories).
- Adapt for the program participants, as needed, C&I Branch training and educational resources.
- Facilitate opportunities for participant interaction with EPA, EPA Regions, other ENERGY STAR participants, affiliated associations and organizations, SPPs and industry experts to foster best practice sharing.
- Assist EPA staff in continually assessing website content for accuracy, appropriateness and value, recommending additions, deletions and corrections.

Deliverable

Due Date

“*Successes in Sustainability*” documents for each sector, DEES webinar slide set, *Active Partner* fact sheet. Support for NADA module development per Work Plan.

Per COR Accepted Work Plan or COR Technical Direction

TASK 7. Tracking, Evaluating and Reporting Key Program Metrics

To measure success in meeting program goals, it is important to track key small business and congregational participant’s accomplishments and activities related to improving building energy performance. The Contractor should assist the C&I Branch small business and congregations staff in developing a management plan that would continually evaluate how well program strategies, activities and content are achieving program goals. In doing so, the Contractor would help determine key metrics related to tracking program accomplishments and activities. The Contractor shall assist in the collection of program data, and in developing and preparing reports that would interpret and explain the implications of the data. Subsequently, the Contractor will provide recommendations on how to improve program performance.

Deliverable

Due Date

Tracking, Reporting and Evaluating Key Program Metrics

Per COR Accepted Work Plan or COR Technical Direction

ADDITIONAL REQUIREMENTS

Place of Performance:

Washington, D.C. metro area or per COR’s Technical Direction. The Contractor shall ensure the timely exchange of materials with the EPA office located at 1200 Pennsylvania Ave., NW, Washington, DC 20460, as required.

Period of Performance:

November 15, 2019 – November 14, 2020

Deliverable/Delivery Schedule:

Per SOW above, or per COR approved Work Plan, or per COR's Technical Direction.

Deliverable Shipping Instructions:

Electronic copies of all deliverables, unless otherwise directed by COR, one each to:

Jerry W. Lawson
US EPA, 6202A
Contract Officer Representative
1200 Pennsylvania Ave., NW
Washington, D.C. 20460
202.343.9314
lawson.jerry@epa.gov

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reed.clark@epa.gov